

Retention and Classification Report

Agency: Washington County (Utah). County Assessor (2433)

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Records Officer

27646	Commercial personal property records
27647	Copy receipts
27648	DMV Abatements
26709	DMV Property Tax Distribution Report
27649	Mobile home personal property records
27651	Personal property refunds
27650	Personal property transaction reports
27652	Treasurer's receipts
27652	Treasurer's receipts

AGENCY: Washington County (Utah). County Assessor

SERIES: 27646

3

TITLE: Commercial personal property records

DATES: 2001-

ARRANGEMENT: Chronological by year

DESCRIPTION:

These records include the paper copy of the Personal Property Affidavits aka Signed Statements (GRS 11-8 3 yrs), Personal Property Audits (GRS 11-9 5 yrs), & Refund Records aka BOE (GRS 11-14 3 yrs) for commercial personal property. These paper records have been scanned into the computer and the digital copy becomes the record copy. Once scanned, the paper records are used for back up purposes only.

RETENTION:

Retain 3 year

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 7, Item 1.

AUTHORIZED: 02/09/2011

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper copy: Retain in Office for 3 years and then destroy.

APPRAISAL:

Administrative

AGENCY: Washington County (Utah). County Assessor

SERIES: 27646

TITLE: Commercial personal property records

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Washington County (Utah). County Assessor

SERIES: 27647

3

TITLE: Copy receipts

DATES: 2001-

ARRANGEMENT: Chronologically by year

DESCRIPTION:

These reports provide a daily record of cash balances, receipts, and disbursements.

RETENTION:

Retain 3 years

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule CNT 5, Item 10.

AUTHORIZED: 02/09/2011

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year and then transfer to Agency Record Center. Retain in Agency Record Center for 2 years and then destroy.

APPRAISAL:

Fiscal

AGENCY: Washington County (Utah). County Assessor

SERIES: 27647

TITLE: Copy receipts

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Washington County (Utah). County Assessor

SERIES: 27648

3

TITLE: DMV Abatements

DATES: 2001-

ARRANGEMENT: Chronologically

DESCRIPTION:

These records are the carbon copy of the "Entitlement Notice" of the Abatement Application Files (County GRS 13-1). The original is scanned and then sent to the Clerk's Office and retained permanently with all Abatement Application Files.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 7, Item 1.

AUTHORIZED: 02/09/2011

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Computer data files backup: Retain in Office for 1 year and then delete.

Paper copy: Retain in Office for 3 years and then destroy.

APPRAISAL:

Administrative Fiscal

PRIMARY CLASSIFICATION:

Public

AGENCY: Washington County (Utah). County Assessor

SERIES: 26709

3

TITLE: DMV Property Tax Distribution Report

DATES: 2001-

ARRANGEMENT: Chronological by date and thereunder by taxing district

DESCRIPTION:

These are daily reports from the Department of Motor Vehicles listing tax collections. The reports include transaction type and number, name, address, model year, make code, class code, processing county, assessing body, plat number, tax amount, daily totals, and deposit to the PTIF account.

RETENTION:

Retain 2 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule CNT 11, Item 16.

AUTHORIZED: 02/26/2008

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year and then transfer to Agency Record Center. Retain in Agency Record Center for 1 year and then destroy.

APPRAISAL:

Administrative Fiscal

AGENCY: Washington County (Utah). County Assessor

SERIES: 27649

3

TITLE: Mobile home personal property records

DATES: 2001-

ARRANGEMENT: Chronologically

DESCRIPTION:

These paper records include Personal Property Tax Notices (GRS 11-11 3 yrs), carbon copies of Mobile Home Entitlement Notices (Abatement Application Files GRS 13-1 permanent), Refund Records (BOE GRS 11-14 3 yrs), & Application for Residential Exemption.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 7, Item 1.

AUTHORIZED: 02/09/2011

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper copy: Retain in Office for 3 years and then destroy.

APPRAISAL:

Administrative Fiscal

PRIMARY CLASSIFICATION:

Public

AGENCY: Washington County (Utah). County Assessor

SERIES: 27651

3

TITLE: Personal property refunds

DATES: undated

ARRANGEMENT: chronological and then by account number

DESCRIPTION:

These records are personal property vehicle Board of Equalization (BOE) documents. The forms include value, rate and tax dollars in error and may contain name, address, taxing district, year and make of vehicle, value and tax amount paid, reason for refund and amount refunded. The assessor does not issue refunds but only recommends a refund to the county auditor. They are used for refunds made for double or erroneous payments of personal property tax.

RETENTION:

Retain 3 years

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule CNT 11, Item 14.

AUTHORIZED: 02/09/2011

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year and then transfer to Agency Record Center. Retain in Agency Record Center for 2 years and then destroy.

AGENCY: Washington County (Utah). County Assessor

SERIES: 27651

TITLE: Personal property refunds

(continued)

APPRAISAL:

Administrative Fiscal

PRIMARY CLASSIFICATION:

Public

AGENCY: Washington County (Utah). County Assessor

SERIES: 27650

3

TITLE: Personal property transaction reports

DATES: 2001-

ARRANGEMENT: Chronologically

DESCRIPTION:

These records include Tax Collection Reports aka Transaction Edit Listings printed daily and/or yearly. The report includes account number, tax year, taxing district, business or farm name, date, time, receipt number, amount, daily totals, and grand totals. They are used to report the personal property tax collections.

RETENTION:

Retain 2 years

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule CNT 11, Item 16.

AUTHORIZED: 02/09/2011

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year and then transfer to Agency Record Center. Retain in Agency Record Center for 1 year and then destroy.

APPRAISAL:

Administrative Fiscal

AGENCY: Washington County (Utah). County Assessor

SERIES: 27650

TITLE: Personal property transaction reports

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Washington County (Utah). County Assessor

SERIES: 27652

3

TITLE: Treasurer's receipts

DATES: undated

ARRANGEMENT: Chronologically

DESCRIPTION:

These records include personal property tax deposits made to the treasurer's office. They include the amount and date of deposit of monies into county accounts. They are used to show the amount and date of deposit of monies into county accounts.

RETENTION:

Retain 3 years

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule CNT 5, Item 11.

AUTHORIZED: 02/09/2011

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year and then transfer to Agency Record Center. Retain in Agency Record Center for 2 years and then destroy.

APPRAISAL:

Administrative Fiscal

AGENCY: Washington County (Utah). County Assessor

SERIES: 27652

TITLE: Treasurer's receipts

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Washington County (Utah). County Assessor

SERIES: 26781

3

TITLE: tax appraisal records

DATES: 1900-

ARRANGEMENT: Numerical by parcel number

DESCRIPTION:

Tax appraisal records include complete information about the appraisal and assessment of real property. This information includes the taxpayer's name, property address, serial number, and legal property description including acreage. Information about improvements includes description, lists of taxable features, and photographs. Information is gathered in order to establish assessed valuations for land and improvements. Any board of equalization adjustments are also noted. These records contain the complete information on the appraisal and assessment of real property. The folders contain the taxpayer's name, property address, serial number, legal description including acreage, improvements (size, quality of building, list of taxable features of improvement and photographs of improvements), assessed valuations for land and improvements, notes regarding Board of Equalization adjustments, and factoring worksheets.

RETENTION:

Retain permanently

DISPOSITION:

Retain in agency custody.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule CNT 11, Item 1.

AUTHORIZED: 05/16/2008

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Computer data files: Retain in Office permanently.

AGENCY: Washington County (Utah). County Assessor

SERIES: 26781

TITLE: tax appraisal records

(continued)

Paper: Retain in State Records Center for 2 years and then transfer to State Archives with authority to weed.

APPRAISAL:

Administrative Fiscal Historical

PRIMARY CLASSIFICATION:

Public